



Status Reporting Frequently Asked Questions (or Questions that we wish were Frequently Asked)

1. What do I need to do with issues?

Each issue must have a planned completion date and an owner assigned. A corrective action plan is needed for all open issues. Each open issue should be updated monthly, as part of project status reporting, with corrective action plan activity.

If the Due Date cannot be met, change it and explain in the Resolution Description section. Date and initial all entries.

2. When do I close an issue?

If you have provided a corrective action plan for an issue AND there are no outstanding action items remaining to be completed, please close the issue. If the issue still has outstanding action items or the corrective action plan has not yet been implemented, please do not close the issue.

3. How is my phase budget assessed?

Remember, only the PHASE budget is assessed. The phase budget is assessed based on the budget reported in the "Cost Tracking" tab. The "Status" tab must reflect the same approved phase budget as the "Cost Tracking" tab. Note: that this may vary from the forecast cost which is acceptable. You should also ensure that the forecast is updated each month. Be certain that you are using a reasonable labor rate (labor cost per hour plus overhead) for reporting costs for internal and external resources.

4. What is the "Cost Forecast" and what is it used for?

The "Cost Forecast" is the dollar estimate to complete (ETC) for the phase. ETC is future dollars planned to be spent on the phase and the ETC is used to define how much money is planned to be spent on the phase in future months. Phase cost is a total of "Actual Costs" from the "Cost Tracking" tab and ETC dollars from the "Cost Forecast" tab. Remember, forecast dollars are replaced with the actual dollars reported for the month when status reporting is completed. Also, forecast dollars must be managed – moved to the correct month to adjust for late starts or early starts to tasks. Make adjustments to both your "Cost Forecast" and your Staffing Plan on a monthly basis to reflect project realities.

5. On what basis are my actual and planned hours assessed?

Hours are assessed based on information provided in the monthly project status report created in the "Status" tab. Hours are verified against the staffing plan, so, ensure your staffing plan and the hours in the status report are accurate and up to date. Also ensure that last month's plan to date



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hours and actual to date hours when added to the current month's planned hours and actual hours equal the current month plan to date hours and actual to date hours. If there's a discrepancy in any of the above, explain it by entering a note in the "Project Staff Utilization" Indicator (jelly bean).

If there is not an approved staffing plan attached in the "Document Management" tab, we will assume that resource utilization is constant for all months and will use the Current Month Plan Hours as the basis of our resource utilization analysis. We will compare the amount of time remaining in the project with the remaining hours to see if the hours estimate to complete is logical and achievable. Check your planned resource utilization for the phase and ensure that it is realistic.

6. I have my planned milestones listed on the schedule tab, what else do I need to do with them?

If you complete a milestone within a reporting period, indicate this in the accomplishment this period section. If you completed work towards the milestone include this information and report a percentage complete. If you plan to complete or work on a milestone in the next reporting period indicate that in the planned accomplishments section of the status report. If a forecast date is in the reporting month and the milestone was not completed, reforecast the date.

Remember, if your phase schedule is extended, revisit your planned milestones and adjust dates or add milestones as appropriate.

7. I'm confused about how many milestones and key project deliverables I need to include on the schedule tab.

Remember that the jelly bean assessment is on milestones and key project deliverables, so it is fine to list both on the schedule tab. We anticipate that there will be a milestone or key project deliverable on most projects at least every four to six weeks; otherwise, we will be concerned about how progress is able to be measured on the project.

8. What should I report as my Completion Percent for the phase and for the project?

You can choose whether to report based on schedule, cost, hours or earned value. Select a metric that provides a reasonable picture of the progress of the project. Report consistently unless you provide an explanation for why the basis of the percentage changes.

9. How should I report my accomplishments?

Use active verbs that indicate progress that you have made towards the milestones and deliverables that will help you to achieve the goals of the project. If an accomplishment was planned for the current period last month indicate if it was completed, if it is still planned or, if it is no longer planned, the reason it is not necessary.



10. What do I need to include in the document management tab?

In general, the more you include in the document management tab, the better we can understand your project. See the PPM workflow to ensure that you have met the minimum requirements. Ensure there is a staffing plan that provides planned and actual hours by resource by month. If you have a change, ensure that the change request with the necessary departmental approvals is included.

11. Any additional advice?

Double check your status report to ensure that all of the sections are completed and that the information provided is accurate for the month for which the project is being submitted. Ensure that when you review the data, it makes sense. If not, it might be worth double checking for accuracy. If feasible, have someone familiar with your project review your report before submission for assessment, especially on a project's first status report